

Message Text

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PAGE 01 BONN 05146 01 OF 04 012259Z

61

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C O N F I D E N T I A L SECTION 01 OF 04 BONN 05146

E.O. 11652: GDS

TAGS: ENRG, GW

SUBJECT: ECG - PRODUCER/CONSUMER RELATIONS AND
RELATIONS WITH DEVELOPING COUNTRIES

THE ECONOMICS MINISTRY HAS PROVIDED US IN CONFIDENCE
WITH A COPY OF A WORKING PAPER IT HAS PREPARED ON THE
ABOVE SUBJECT. SINCE IT HAS NOT YET CLEARED THIS PAPER
WITH THE JAPANESE, IT ASKS THAT WE NOT DIVULGE ITS
CONTENTS TO OTHER DELEGATIONS. THE TEXT OF THE PAPER
FOLLOWS.

BEGIN TEXT WORKING PAPER

THE PROSPECTS FOR ACCELERATED INDUSTRIALISATION
AND SOCIO-ECONOMIC DEVELOPMENT IN THE PRINCIPAL
PRODUCING AREAS, AND THE IMPLICATIONS FOR GLOBAL
PATTERNS OF INTERNATIONAL TRADE AND INVESTMENT

SUBMITTED BY THE GERMAN DELEGATION IN COOPERATION
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PAGE 02 BONN 05146 01 OF 04 012259Z

WITH THE JAPANESE DELEGATION

1. THIS PAPER DEALS ONLY WITH THE OPEC COUNTRIES.
IT ASSESSES THESE COUNTRIES' DEVELOPMENT PROSPECTS
(A) AND THEN THE EFFECTS ON THE WORLD ECONOMY (B).
IT THEN DRAWS FIRST CONCLUSIONS (C).

A. PROSPECTS FOR DEVELOPMENT IN THE OIL-PRODUCING
COUNTRIES

I. PRE-CONDITIONS FOR INDUSTRIALISATION AND
SOCIO-ECONOMIC DEVELOPMENT

2. IF INDUSTRIALISATION AND DEVELOPMENT ARE TO BE
ACCELERATED, A COMBINATION OF VARIOUS PRE-CONDITIONS
IS REQUIRED, IN PARTICULAR:

- CAPITAL FOR DEVELOPING PRODUCTIVE INDUSTRIAL
CAPACITY,
- ECONOMIC AND SOCIAL INFRASTRUCTURE,
- A LABOUR FORCE OF SUFFICIENT SIZE AND QUALITY,
- MANAGEMENT WITH THE NECESSARY KNOW-HOW AT ITS
DISPOSAL,
- RAW MATERIALS FOR PROCESSING;
- SUITABLE SITES FOR INDUSTRY,
- THE POLITICAL WILL IN THE COUNTRIES THEMSELVES
TO ACCELERATE INDUSTRIAL AND SOCIO-ECONOMIC
DEVELOPMENT.

3. NO PARAMETERS ARE AVAILABLE WHICH WILL SHOW IN
DETAIL TO WHAT EXTENT AND IN WHAT COMBINATION THE
ABOVE PRE-CONDITIONS EXIST IN THE OPEC COUNTRIES.
THE PROSPECTS FOR ACCELERATED DEVELOPMENT IN THESE
COUNTRIES CAN ONLY BE GUESSED AT WITH THE AID OF A
FEW POINTERS.

THE INDICATORS CHOSEN - ALTHOUGH THEY ARE NECESSARILY
FRAGMENTARY BECAUSE OF THE LIMITED DATA AND
INFORMATION AVAILABLE - ARE:

- REVENUE FROM OIL EXPORTS AND GROSS NATIONAL
PRODUCT PER HEAD, AS ROUGH GUIDES TO THE AMOUNT OF
CAPITAL PRESENT (TABLE L);
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PAGE 03 BONN 05146 01 OF 04 012259Z

- POPULATION FIGURES AS A POINTER TO THE POTENTIAL
LABOUR FORCE (TABLE 2);
- THE COUNTRIES' DEVELOPMENT PLANS AS A SIGN OF
THE POLITICAL WILL TO ACCELERATE DEVELOPMENT;
- THE MOVEMENT OF IMPORTS TO THE OPEC COUNTRIES
(TABLE 3).

THIS MOVEMENT, WHICH HELPS TO IMPROVE THE COMBINATION

OF PRODUCTION FACTORS GIVES SOME IDEA OF THE SIZE
OF THE COUNTRIES' ABSORPTIVE CAPACITY. IT ALSO GIVES
AN INDICATION OF THE PROBABLE TIME SCALE OF
ACCELERATED DEVELOPMENT.

II. PROSPECTS FOR DEVELOPMENT IN THE OPEC COUNTRIES

NOTE BY OC/T: COMPAMENDED TO REMOVE SPECIAL HANDLING CAPTION
PER MR. L. BUTCHER, EB/ORF

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PAGE 01 BONN 05146 02 OF 04 291724Z

45
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C O N F I D E N T I A L SECTION 02 OF 04 BONN 05146

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4. TABLES 1 TO 3 SHOW THAT THE PRE-CONDITIONS FOR
DEVELOPMENT VARY WIDELY FROM COUNTRY TO COUNTRY WITHIN
THE OPEC GROUPING. IT IS THUS NECESSARY TO DIVIDE
THE COUNTRIES INTO GROUPS:

A. OIL-PRODUCING COUNTRIES WITH HIGH PER
CAPITA INCOMES

BECAUSE OF THEIR RAPIDLY INCREASING REVENUE FROM
OIL EXPORTS, THESE COUNTRIES ARE WELL PROVIDED WITH
CAPITAL TO FINANCE DEVELOPMENT. THE OTHER PRE-

CONDITIONS, HOWEVER, ARE NOT MET. THEY ARE THINLY POPULATED AND THEIR POTENTIAL LABOUR FORCES ARE THEREFORE INSIGNIFICANT; THEY LACK TECHNICAL AND MANAGERIAL KNOW-HOW, HAVE TRADITIONALLY-BASED SOCIAL STRUCTURES, POSSESS NO RAW MATERIALS WITH THE EXCEPTION OF ENERGY, DO NOT YET DISPOSE OF AN EFFICIENT TRANSPORT NETWORK, ETC. FULLY ELABORATED LONG-TERM DEVELOPMENT PLANS DO NOT YET EXIST. SPECIAL ADDITIONAL EFFORTS WILL BE NEEDED TO PUSH FORWARD THE ESTABLISHMENT OF INDIGENOUS INDUSTRIES. A START
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PAGE 02 BONN 05146 02 OF 04 291724Z

MIGHT BE MADE WITH INVESTMENT IN ENERGY-INTENSIVE INDUSTRIES AND OIL-PROCESSING PLANT. SUCH EFFORTS WOULD CALL FOR THE EMPLOYMENT OF FOREIGN SPECIALISTS.

B. OIL-PRODUCING COUNTRIES WITH MEDIUM PER CAPITA INCOMES

THIS GROUP OF OPEC COUNTRIES PROBABLY FULFILLS THE PRE-CONDITIONS FOR ACCELERATED DEVELOPMENT BETTER. SUFFICIENT CAPITAL IS PRESENT. LABOUR IS AVAILABLE. SOME OF THESE COUNTRIES ALREADY HAVE LONG-TERM DEVELOPMENT PROGRAMMES AND FUNCTIONING TRANSPORT SYSTEMS. HOWEVER, ALL THE COUNTRIES IN THIS GROUP ARE LIKELY TO HAVE SERIOUS DIFFICULTIES IN OBTAINING TECHNICAL AND MANAGERIAL KNOW-HOW AND MAKING IT AVAILABLE. INDUSTRIALISATION WILL CONCENTRATE ON THE PROCESSING OF LOCAL RAW MATERIALS. CONSIDERATION MIGHT ALSO BE GIVEN TO TRANSFERRING MANUFACTURING PLANT OF A TECHNOLOGICALLY SIMPLE KIND FROM THE INDUSTRIALIZED NATIONS TO THE OPEC COUNTRIES. THE PROGRESS MADE IN INDUSTRIALISATION WILL DETERMINE WHETHER IMPORTS CAN BE RAISED TO MATCH HIGHER OIL REVENUES. IN THE MEDIUM AND LONG TERM, THESE COUNTRIES' ABSORPTIVE CAPACITIES ARE LIKELY TO GO ON INCREASING AS A RESULT OF THE COMPARATIVELY FAVOURABLE PRE-CONDITIONS FOR ECONOMIC GROWTH.

C. OIL-PRODUCING COUNTRIES WITH LOW PER CAPITA INCOMES

THESE COUNTRIES ARE, IT IS TRUE, RECEIVING CONSIDERABLE OIL REVENUES WHICH CAN BE INVESTED AS CAPITAL TO ACCELERATE DEVELOPMENT. HOWEVER, EVEN IF THE OTHER PRE-CONDITIONS FOR GROWTH ARE MET, THE ADEQUACY OF THIS CAPITAL INFLOW SHOULD NOT BE OVER-ESTIMATED IN VIEW OF THE NUMEROUS DEVELOPMENT TASKS WHICH LIE AHEAD. ACCELERATING INDUSTRIALISATION WITHIN A SHORT PERIOD OF TIME WOULD SEEM DIFFICULT. IMPORTS

ARE THEREFORE NOT LIKELY TO RISE PARTICULARLY FAST.
INDUSTRIAL CAPACITY IS STILL LARGELY
LACKING AND MUST FIRST BE CREATED. THE INVESTMENT
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PAGE 03 BONN 05146 02 OF 04 291724Z

NEEDED IN INFRASTRUCTURE HAS A HIGH CAPITAL CO-
EFFICIENT AND TAKES A LONG TIME TO PRODUCE RESULTS.
IT IS PROBABLE THAT THESE OPEC COUNTRIES WILL IN
THE MEDIUM AND LONG TERM ABSORB THEIR OIL REVENUES
COMPLETELY AND HAVE TO RELY FOR THE FURTHER
DEVELOPMENT OF THEIR ECONOMIES ON FOREIGN CAPITAL.

B. EFFECTS ON THE STRUCTURE OF THE WORLD ECONOMY
IN THE FIELDS OF TRADE AND INVESTMENT

I. WORLD TRADE

5. TABLE 4 SHOWS THE GLOBAL PATTERN OF INTERNATIONAL
TRADE BETWEEN 1970 AND 1972, AND INCLUDES THE OPEC
COUNTRIES. THE EXPORT SIDE OF THIS PATTERN WILL
ALREADY BE CHANGED IN 1974 AND AFTER BECAUSE OPEC
EXPORTS ARE RISING CONSIDERABLY IN VALUE TERMS.
EXPORT PRICES WILL INCREASE ACCORDINGLY. (SEE
FOOTNOTE NO. 1 BELOW) THE OPEC COUNTRIES ARE THUS
LIKELY WITHIN A SHORT TIME TO ACHIEVE HIGHER EXPORT
EARNINGS IN INTERNATIONAL TRADE THAN THE REST OF THE

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PAGE 01 BONN 05146 03 OF 04 291725Z

45

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C O N F I D E N T I A L SECTION 03 OF 04 BONN 05146

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DEVELOPING COUNTRIES. IN THE MEDIUM AND LONG TERM
THE VALUE OF THE PRODUCER COUNTRIES' EXPORTS MAY ALSO
RISE BECAUSE INVESTMENT IN THE OIL AND OTHER INDUSTRIAL
SECTORS WILL LEAD TO EXPORTS OF PROCESSED PRODUCTS.

FOOTNOTE NO. 1 - ACCORDING TO WORLD BANK AND OECD
ESTIMATES, FROM 14.5 BILLION US DOLLARS IN 1972 TO
MORE THAN 85 BILLION US DOLLARS IN 1974.

6. THE IMPORT SIDE OF THE PATTERN WILL ONLY CHANGE
IF IT PROVES POSSIBLE TO ENLARGE SUBSTANTIALLY THE
CURRENTLY LIMITED ABSORPTIVE CAPACITY OF THE OPEC
COUNTRIES. THE OIL-PRODUCING COUNTRIES' GREATEST
DEMAND IS LIKELY TO BE FOR CAPITAL GOODS (FOR INDUSTRY
AND INFRASTRUCTURE) AND BE ADDRESSED TO THE
INDUSTRIALIZED COUNTRIES. IT IS NOT POSSIBLE AT
THE MOMENT TO SAY HOW FAR THIS DEVELOPMENT WILL ALTER
THE PATTERN OF GLOBAL IMPORTS IN THE MEDIUM AND LONG
TERM.

II. INVESTMENT (SEE FOOTNOTE NO. BELOW.)

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PAGE 02 BONN 05146 03 OF 04 291725Z

7. SO FAR, THE MAIN SUPPLIERS OF INVESTMENT
HAVE BEEN THE INDUSTRIALISED COUNTRIES AND ISOLATED
OIL-PRODUCING STATES. AS A CONSEQUENCE OF THEIR
SURPLUS REVENUES, OTHER OPEC COUNTRIES AS WELL WILL
NOW NOT ONLY BE INVESTING MORE DOMESTICALLY BUT WILL
ALSO BE MORE STRONGLY REPRESENTED AMONG THE CAPITAL-
EXPORTING COUNTRIES. TO THE EXTENT THAT THIS
HAPPENS, A BASIC CHANGE IN THE PATTERN OF INTERNATIONAL
INVESTMENT WILL RESULT. THIS DEVELOPMENT WILL OCCUR
EARLIER THE MORE RAPIDLY OIL REVENUES ARE INVESTED.

FOOTNOTE NO. 2 - THIS IS UNDERSTOOD TO MEAN DIRECT
INVESTMENT

8. IT IS DIFFICULT TO SAY AT PRESENT IN WHICH
ECONOMIC REGIONS THE OPEC COUNTRIES WILL INVEST.

INASFAR AS THEY DO NOT INVEST AT HOME THEIR FUNDS
WILL FLOW - IN THE ABSENCE OF ATTRACTIVE ALTERNATIVES
- TO THOSE INDUSTRIALISED AND DEVELOPING COUNTRIES
WHICH ECONOMICALLY AND POLITICALLY OFFER THE MOST
PROMISING INVESTMENT OPENINGS IN THE LONGER TERM.
THE REGIONAL AND SECTORAL SPREAD OF THIS INVESTMENT
COULD CAUSE ECONOMIC PROBLEMS, ABOVE ALL IN THE
INDUSTRIALISED COUNTRIES (E.G. IN COMBATTING INFLATION).

9. IN ADDITION, ONE CAN EXPECT ON THE BASIS OF
PREVIOUS EXPERIENCE THAT THE INDUSTRIALISED COUNTRIES
WILL CONTINUE TO INVEST IN THE OIL-PRODUCING COUNTRIES,
AND MAY EVEN INVEST MORE. COOPERATION OF THIS KIND
WOULD NOT ONLY CONTRIBUTE TO THE DESIRABLE INTEGRATION
OF THE WORLD ECONOMY; IT IS ALSO SOUGHT AFTER BY
MANY OIL-PRODUCING COUNTRIES BECAUSE THEY FEEL IT
GIVES A CERTAIN GUARANTEE FOR THE SUCCESS OF
DEVELOPMENT PROJECTS.

C. INITIAL CONCLUSIONS

THE ABOVE ANALYSIS GIVES RISE TO THE FOLLOWING
QUESTIONS AMONG OTHERS:

10. PROSPECTS FOR DEVELOPMENT IN THE OIL-PRODUCING
COUNTRIES

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PAGE 03 BONN 05146 03 OF 04 291725Z

- WHAT CAN THE CONSUMER COUNTRIES DO TO SUPPORT
ACCELERATED INDUSTRIALISATION IN THE OIL-PRODUCING
COUNTRIES? (E.G.

BY PROMOTING COOPERATION BETWEEN
COMPANIES IN THE CONSUMER AND PRODUCING COUNTRIES,
--BY IMPROVING TECHNICAL ADVISORY SERVICES,
--BY OBTAINING AND MAKING AVAILABLE TECHNICAL
AND MANAGERIAL KNOW-HOW,

--BY IMPROVING PLANNING AND ORGANISATIONAL
CAPACITY IN THOSE PRODUCING COUNTRIES WHICH ARE
INTERESTED IN THIS);

- HOW CAN THE SCARCITY OF QUALIFIED LABOUR IN THE
PRODUCER COUNTRIES BE REMEDIED? (E.G. TRAINING OF
MORE SKILLED WORKERS, PROVISION OF LABOUR FROM THE
CONSUMER COUNTRIES);

- WHAT FORM OF INDUSTRIALISATION WOULD BEST SUIT
THE PRODUCING COUNTRIES? (E.G. INDUSTRIES WHICH CAN
ACT AS GROWTH POINTS);

- IF THE CONSUMER COUNTRIES TAKE THE MULTILATERAL
APPROACH TO HELPING THE OIL-PRODUCING COUNTRIES,

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PAGE 01 BONN 05146 04 OF 04 291728Z

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C O N F I D E N T I A L SECTION 04 OF 04 BONN 05146

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WHERE AND HOW IS COORDINATION TO BE ORGANISED? (E.G. LAYING DOWN OF GUIDELINES WITHIN OECD COVERING INFORMATION AND CONSULTATION, AND JOINT TALKS WITH THE PRODUCING COUNTRIES CONCERNED);

- IF A BILATERAL APPROACH IS CHOSEN, WHERE AND HOW ARE MULTILATERAL CONSULTATIONS TO BE HELD ON THE SCHEMES PLANNED BY INDIVIDUAL CONSUMER COUNTRIES? (E.G. WITHIN OECD USING CONSULTATION PROCEDURES).

11. EFFECTS ON INTERNATIONAL TRADE AND INVESTMENT

- SHOULD ACCESS TO MARKETS IN THE CONSUMER COUNTRIES BE WIDENED FOR THE EXPORTS OF THE PRODUCING COUNTRIES?

- SHOULD TRADE POLICY ISSUES ARISING BETWEEN PRODUCING AND CONSUMER COUNTRIES BE INCLUDED IN THE GATT MULTILATERAL TRADE NEGOTIATIONS? (E.G. AGREEMENTS NOT TO RESTRICT EXPORTS WHEN RAW MATERIALS ARE SCARCE);

- HOW CAN ANY BILATERAL AGREEMENTS BETWEEN CONSUMER AND PRODUCER COUNTRIES BE SO DESIGNED THAT THEY DO NOT DISTORT TRADE PATTERNS AND LEAD TO DISCRIMINATION AMONG MARKETS, THUS CAUSING MULTI-

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PAGE 02 BONN 05146 04 OF 04 291728Z

LATERAL ECONOMIC RELATIONS TO BE DISSOLVED (E.G. BY BANNING PRICE AND QUANTITY FIXING);

- WHAT CAN BE DONE TO IMPROVE THE DEVELOPING COUNTRIES' POSITION IN INTERNATIONAL TRADE? (E.G. EXPANDING TARIFF PREFERENCES AND REMOVING TRADE RESTRICTIONS IN THE CASE OF THE DEVELOPING COUNTRIES IN THE CONTEXT OF THE GATT NEGOTIATIONS);
- WHAT CAN BE DONE TO CHANNEL SURPLUS CAPITAL NOT USED BY THE PRODUCING COUNTRIES AT HOME MORE HEAVILY TOWARDS THE DEVELOPING COUNTRIES? (E.G. OFFER BY THE CONSUMER COUNTRIES TO PROVIDE THE DEVELOPING COUNTRIES WITH TECHNICAL AND MANAGERIAL KNOW-HOW);
- ARE THERE ECONOMIC, POLITICAL OR OTHER LIMITS ON THE INVESTMENT OF OIL REVENUES IN CONSUMER COUNTRIES? (E.G. REINFORCING INFLATION, DANGER OF UNDESIRABLE CONCENTRATION);
- ARE THERE LIMITS (MACROECONOMIC OR SECTORAL) TO THE INDUSTRIALISED COUNTRIES' CAPACITY TO PROVIDE GOODS AND PERSONNEL, WHICH MIGHT SLOW DOWN THE PACE OF INDUSTRIALISATION IN THE PRODUCING COUNTRIES?

END TEXT

THE PAPER ALSO CONTAINS THE FOLLOWING TABLES:
TABLE 1: REVENUE FROM CRUDE OIL EXPORTS AND GROSS NATIONAL PRODUCT PER HEAD IN THE OPEC COUNTRIES 1973 AND 1974;

TABLE 2: POPULATION AND OIL PRODUCTION IN THE OPEC COUNTRIES IN 1973

TABLE 3: MOVEMENT OF IMPORTS BY OPEC COUNTRIES 1970 - 1972

TABLE 4: PATTERN OF INTERNATIONAL TRADE 1970 - 1972.

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